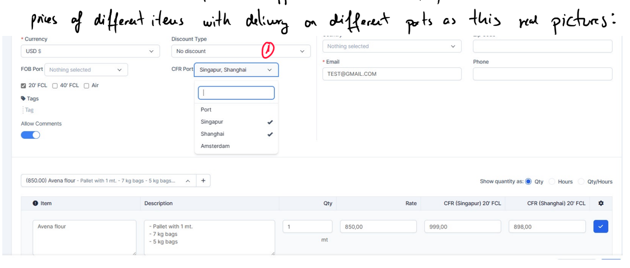
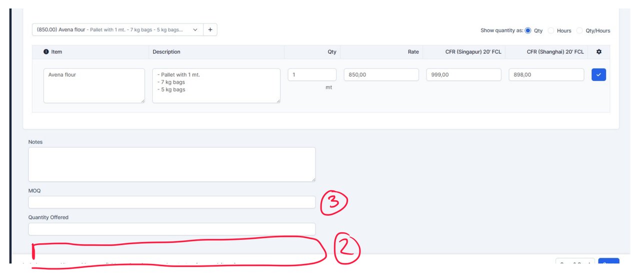
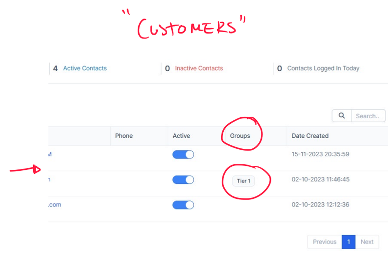
PERFEX CRM

We have a module called "Freights", already developed, and we need to do some modifications to it. Right now, what is doing is to do on "Sales" - "Proposals", different calculation to, quote prices of different items with delivery on different ports as this real pictures:

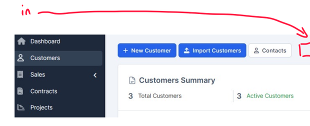




"CUSTOMERS"



① Depending on the group that customer belongs, to set by default a discount to the base price of the item, customer's group can be: Tier 1, Tier 2, Tier 3 →
To set the page where we can put the auto % discount value for each group in → "Group settings"



base price of the item to apply the discount in "Sales" - "Item"

② Here we need to put the field "Shipment period" and:

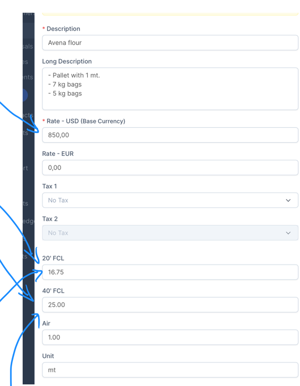
Shipment period has to be auto filled taking into account "Open till" date, for instances if Open till is 25/12/2023, then Shipment period has to show: "January 2024", it's taking day 25 of December adding 15 days, so we are in January, that why systems calculate January 2024, if we are in 10/12/2023, then should write: December 2023.

This can be manually edited by me, so systems write for example " December 2023", but for that proposal I decide to change it manually to whatever text.

③ MOQ

MOQ field, already existing in proposal, by default has to show the quantity that can be loaded on the first item added on that proposal, and column, for instances item 1 on a 20FCL, if its 17.5 mt, then has to show on the MOQ field 17.5 this number can be found in "Sales" - "item"

This field can be edited manually on each proposal.



④ When sending the proposal .PDF

Add on the bottom of the pdf, which is the total quantity that can be load of each item per size of container quoted, if I quote 20'fcl and 40'fcl of item 1, then show a legend on the bottom of the pdf, with the max capacity that can be loaded. This info can be found on Sales – Items – "item". Just show 20'fcl and 40'fcl options, don't show AIR.

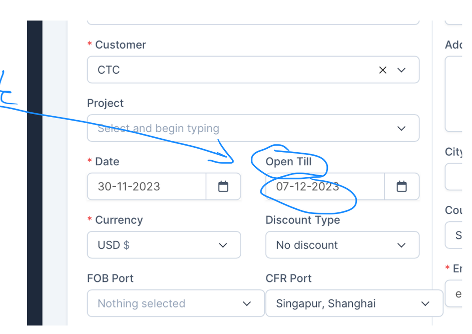
the quantity that can be load is here

⑤ - User's permissions, to be able to give different permission to staff members, to see, create, edit, delete, etc… proposals, or to convert to invoice, etc… so, some of them can see proposals, and add comments to the proposals, but can edit, convert to invoice, or delete. Etc…

→ "Setup" - "Staff" → Member

⑥ - When a "Open date" of a proposal has already pass, when someone of the staff want to create an invoice, a message has to appear saying that the Validity day already pass, if they are sure to proceed? then we can click yes and proceed to create invoice, or no, to cancel de convert process.

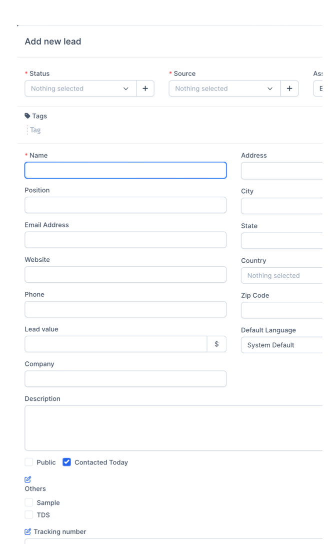
Open date



⑦ - Reports – Sales – Items report (Is not working, please fix it)

⑧ - If a Proposal has not been converted yet to Invoice, to send automatically and email to the customer reminding him that the validity day is about to expire. This template has to be easy to modify by us, so put in on Setup – Templates, and also I need to put a list of emails of members of the team that will be also receive the email in CC.

⑨ - When creating a LEAD, to be able to put the COMPANY NAME also, address etc… if this lead is converted to customer, then take all this info to create the customer = company.



To add the company name field

⑩ "Stocks" page

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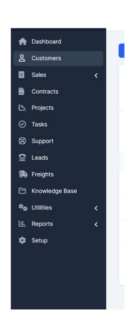

To add here a new menu item "Stocks"

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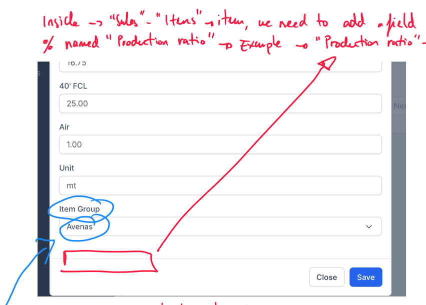

and pay atention to "Item group" for next page.

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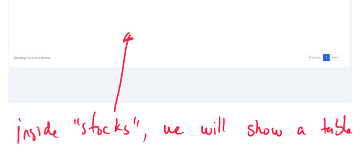
"Stocks"



inside "stocks", we will show a table with the total quantity available of item groups. For example:

Avenas - Coffes - Oranges
4.567,80 2.250,20 300,52

This quantities, are coming from inside of each item group page. So we need to click in "Avenas", and enter in "Avenas" page where we can enter values and adjust manually the value.

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"Avenas Page" Example

→ Total quantity (this is the sum of the table below)

LIST

quantity: can be positive or negative - date - option, can be: - purchase - adjust - invoiced - notes (Text input) not mandatory

- We will add, quantities manually to this table, except invoiced, invoiced, is automatically line added to the table with negative quantity because has to remove part of the stock when we invoice a proposal, depending the item will reduce different ratio.

Example, we invoice 10 mt of "Avena flour" inside de item "Avena flour" the "Production ratio" is 115% means that for 1 unit of this item will consume 1'15 unit of stock.

So 10 mt x 1'15 → 11'5 mt will be consumed and reduced of the stock.

mt = metric tone

"Avenas page" Example

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notes , text input fields, not mandatory to fulfill

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So, 10 mt x 1,15 = 11,5 mt, that will be consumed and reduced of the stock.

mt means metric ton

- Inside "Avenas" Page, to add on top, "limit value", so we can set a limit, for example: 2000 mt, which means when the stocks are below that number and we are creating a "proposal" with an item belonging to that group, system should warn me of low stock, then I click "ok", and I can do the proposal, but at least I know the problematic situation of the stocks.

Inside "Avenas" page, to add on top, "limit value"·, so we can set a limit, for example: 2.000 mt, which means when the stocks are below that numberand we are creating a new "Proposal", with an item belonging to that group, system should warn me of low stock, then I can click "ok", and I can do the proposal, but at least I know the problematic situation of the stock.

MISSIVE APP

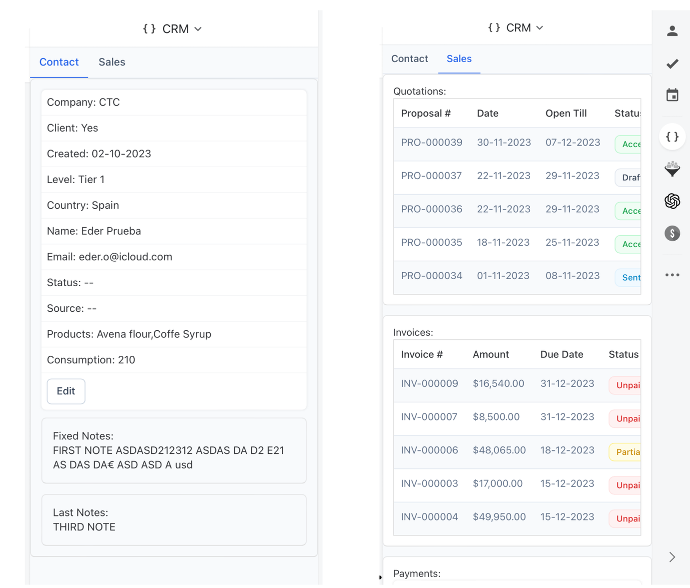
Now we have connected our Perfex CRM with Missive APP, throug a module in perfex crm, called "missiveapp". We need to add some modifications, and mainly to style it better.

You will need to download for free "missive app" to test it

https://missiveapp.com/integrations/iframe → More info

https://missiveapp.com/help/api-documentation/iframe-integrations

What we have now



What we need